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1 Executive Summary

1.1 Overview

FSA University develops and delivers training programs for external partners, specifically colleges and universities that participate in the Title IV program. To prepare financial aid administrators (FAAs) to interact with FSA systems and processes, support has been provided to identify and organize a training curriculum and schedule for external partners (i.e. participating schools). This effort involves the creation of a list of courses and materials that provide the foundation of knowledge for both new and existing FAAs.

This deployment plan provides a detailed description of the process followed by the project team to determine the best approach for deploying this curriculum to FAAs.

1.2 Objectives

The objective of this effort is to support the organizational goal of improving program integrity by providing financial aid professionals with a centralized resource to assist in the selection of training. This deployment plan was developed to create awareness of the curriculum among FAAs. To develop FSA University's capability for future deployment efforts, best practices have been document and shared.

At present, FAAs are informed of FSA-sponsored training on an as-needed basis by checking one of several information sources. Feedback from the FAAs indicates that they want to be more informed about FSA's training offerings. Specifically, they would like FSA to:

- Clearly identify the target audience for the training
- Coordinate the learning objectives among the courses to ensure that they complement one another, rather than having gaps or redundancies
- Schedule training further in advance
- Coordinated training with the financial aid calendar.

1.3 Scope

The goal of this project is to develop and deploy a curriculum from existing FSA training for FAAs. Scope is limited to defining a curriculum for FAAs from existing FSA training. Descriptions for new courses being developed will be included in the curriculum so FAAs can be aware of future training. Training development is out-of-scope. In-scope activities include:

- Collecting best practices related to curriculum development and training deployment
- Developing a curriculum from existing FSA courses and including descriptions for new FSA courses.
- Developing communications that will facilitate buy-in and ownership of the curriculum among stakeholders
- Developing a deployment approach that will promote awareness of the curriculum among FAAs.

1.4 Key Recommendations

To effectively deploy the curriculum, a blended approach that includes electronic, paper-based and face-to-face vehicles is recommended. Since FSA strives to operate as a “paperless” organization, the use of paper-based vehicles is limited and paper-based products will primarily be distributed during live events like conferences and training. This combination of vehicles provides a comprehensive solution and balances the drawbacks of each vehicle with the advantages of other vehicles. Final recommendations are as follows:

- TFAP Website including links (electronic)
- Email announcements (electronic)
- Listservs (electronic)
- Poster/flyer posted in regional offices, provided to FSA customer service representatives and distributed to schools for posting (paper-based)
- Verbal announcements at EACs (face-to-face)
- Verbal announcements at training events (face-to-face)

2 Approach

2.1 Target Audience

The primary target audience for the curriculum includes new and existing financial aid administrators at participating schools. FAAs have a range of roles and responsibilities which depend on the size of the university and the size of the financial aid department. Some FAAs' roles require specialized knowledge of a particular system or application.

This training resource has been designed to be used by financial aid professionals performing the following roles:

- FAAs
- Business Officers
- Auditors
- Accounting Personnel
- System Technicians

2.2 Course Availability/Course Schedule

Feedback from FAAs indicates they want to be more informed about FSA's training offerings, and specifically they would like training to be scheduled further in advance and be coordinated with the financial aid calendar. The project team has discussed how training can be better timed to meet the needs of FAAs, focusing on how to improve the accessibility of training, as well as volume of available training. In addition, the team has discussed the timeliness of systems training updates. Up to this point, course availability and course scheduling have been generally discussed. In the next phase of work, the following considerations will be addressed in detail:

- Is training timed with when FAAs have the greatest need and availability to take courses?
- Is systems training timed to coincide with when training is updated?
- Is there a sufficient number of courses and are courses accessible to FAAs?

2.3 Deployment Approach

2.3.1 Deployment Objectives

Deployment objectives are critical for the successful deployment of TFAP since they provide a decision-making framework for marketing the effort. Objectives include a curriculum that is easily accessible via the web, a clearly defined target audience that includes all FAAs (not just new FAAs), and a deployment strategy that leverages existing FSA vehicles to promote key messages without making a “big splash.” Per the suggestion of FSA sponsor Bill Ryan, existing communication channels have been leveraged as much as possible to create awareness of TFAP. Since the website is a new resource for FAAs, but is based on existing materials, it is important to create awareness among FAAs while also managing expectations of what the new resource offers.

Deployment objectives are listed below:

- **Accessibility**
 - The curriculum should be easily accessible via the web, for this reason, the primary deployment vehicle is the TFAP website.
- **Leverage Existing Vehicles**
 - Guidance provided by FSA sponsorship indicated that existing FSA communication vehicles should be used to promote key messages without creating “a big splash.” As a result, some vehicles previously considered (i.e., Wallet Cards, Post-It Notes, etc.) were eliminated as potential deployment vehicles.
- **Customer Focus**
 - The team will underscore customer focus (FAAs) throughout delivered communications. One of the key messages listed below (please see section 2.3.2) puts the development of the TFAP resource in the context of FAA training needs.
- **Targeted Audience**
 - The audience should be clearly defined.
- **Leverage FSA Touchpoints**
 - The team will promote the curriculum internally to FSA employees who have direct contact with FAAs by providing these individuals with communication materials (i.e., Customer Service Representatives, Case Management, Ombudsman, Schools Channel, Operating Partners).
- **Reach**
 - The team will reach as many new FAAs as possible by using a variety of communication vehicles.

2.3.2 Key Messages

The team developed key messages to ensure that consistent information is included in all promotional materials. Considerations in developing key messages focused on clearly defining the target audience and providing the audience with the appropriate information about the new TFAP website. FAAs will be encouraged to visit the TFAP website which contains the latest information on current and future training opportunities, conferences and resources for FAAs.

Key messages are listed below:

- **Who is the target audience for the communication?**
 - FAAs
 - Business Officers
 - Auditors
 - Accounting Personnel
 - System Technicians
- **What does the audience need or want to know about?**
 - The TFAP website contains the latest information on current and future training opportunities, conferences and other resources for FAAs.
- **When?**
 - This site is currently available for use.

“Training for Financial Aid Professionals” Deployment Plan

- **Where do they need to go?**
 - <<Provide Weblink>>
- **Why?**
 - By popular demand, current and future training, conferences and other resources have been consolidated on the FSA Course Curriculum website. This will provide FAAs with easier access to professional development materials.

2.3.3 Methodology

The Integration Partner shared with the project team best practices from other agencies and private sector clients conducting similar efforts. The team applied these best practices to identify potential communication vehicles applicable for this effort. The identified options were then grouped by type into three categories: electronic, paper-based, and face-to-face. Once criteria were reviewed for each potential vehicle, the team summarized advantages and drawbacks for each vehicle. Based on this qualitative analysis, the team chose complementary vehicles to inform the FAA community of the revised curriculum and its benefits.

Define Potential Deployment Vehicles

To address the question of how to best publicize the curriculum to FAAs, the project team brainstormed a list of potential vehicles using best practices from other agencies and private sector clients as a starting point. This list included successful communication vehicles used in the past at FSA as well as best practices used in similar efforts (where the target audience was geographically dispersed, knowledge varied based on experience, and roles varied based on the size of their universities' financial aid department). Vehicles were grouped into three categories: electronic, paper-based and face-to-face. The table below contains the initial list of brainstormed potential vehicles and includes descriptions of each vehicle. The Y/N column indicates whether the listed vehicles have been recommended to be used (Y) or not (N).

Type	Vehicle	(Y/N)	Description
Electronic	Web Page	Y	New page on FSA University Site
	Web Links	Y	Links to curriculum page, registration page, other relevant pages
	Email Announcement	Y	National Announcement to all schools
	Regional Websites	N	Information on existing regional websites
	Individual Curriculum Q&A	N	Tool to allow individuals to identify personalized courses based on information they provide regarding their experience, and role.
	Listservs	Y	Existing distribution lists.
	P-Messages	N	Messages pushed to schools via their school mailboxes.
	Web banner on IFAP	N	Scrolling banner on the IFAP page that provides news announcements.
	Electronic News Article	N	News article sent electronically.
	Soft Copy of Poster/Flyer	N	Soft copy of a poster/flyer to be emailed to financial aid departments to be printed and posted/distributed.
Paper-Based	Written Letter	N	A written letter to be mailed to schools.
	Poster/Flyer	Y	A poster/flyer to be printed and mailed to schools to be posted.
	Pamphlet	N	A pamphlet with detailed information about the courses to be distributed via mail.
	Post-Its	N	Post-It notes that are printed with the web address for the curriculum.
	Wallet Cards	N	A business card announcing the curriculum and with the web address.
Face-to-Face	Distribute flyers/pamphlets at FSA training events	Y	Distribution of flyers and pamphlets at training events
	Announcements at Conferences	Y	Brief announcements made by senior FSA officials regarding the availability of the curriculum.
	Announcements at Training Sessions	Y	Brief announcements made by facilitators during FSA training events.

“Training for Financial Aid Professionals” Deployment Plan

Define Criteria for Evaluating Vehicles

In order to decide on the most appropriate vehicles for this target audience, the project team needed to be able to evaluate each vehicle. The team identified criteria that were then used to evaluate the vehicles and determine recommendations. The criteria and descriptions are listed below.

Criteria	Description
<i>Accessibility</i>	How easy is it for the audience to access the vehicle?
<i>Effectiveness</i>	How effective is the vehicle for reaching the entire audience?
<i>Measurement</i>	What are the success factors we can use to measure the effectiveness of the vehicle?
<i>Frequency</i>	How often do we need to distribute/publish the vehicle?
<i>Maintenance</i>	How difficult is it to maintain the vehicle?
<i>Push/Pull</i>	Is the audience a passive recipient of information (push mechanism), or do they need to actively access the information (pull mechanism)?
<i>Approvals Required</i>	Who needs to review and approve content?
<i>Expense</i>	How much does it cost?
<i>Labor</i>	How many resources need to be involved?

Summarize Advantages and Drawbacks of Each Vehicle

A summary of the criteria used to evaluate the vehicles was created and defined in terms of the advantages and drawbacks of each vehicle. This information was then used to select the most appropriate vehicles for deployment of the curriculum. Detailed advantages and drawbacks information for each vehicle is included in section 2.3.2 Deployment Vehicles.

Select Combination of Complementary Vehicles

In order to effectively reach the greatest portion of the target audience, several communication vehicles were used to publicize the availability of the curriculum. Selected vehicles complemented each other, and ensure that drawbacks of one vehicle are addressed through the advantages of another vehicle. Recommended vehicles are discussed in section 1.4 Key Recommendations.

2.3.4 Deployment Vehicles

The deployment recommendations in this section provide an optimal mix of vehicles to promote awareness of the new curriculum among FAAs. The primary deployment vehicle will be the TFAP website which will replace the FSA University website. The team developed a prototype of the website, and a screenshot of the prototype is included below. All other vehicles will direct FAAs to use the website. The team continues to develop communication materials and so far has created draft text that includes email/listserv announcements, a draft poster/flyer to be distributed at conferences and events, and talking points for slides that will be used at live events.

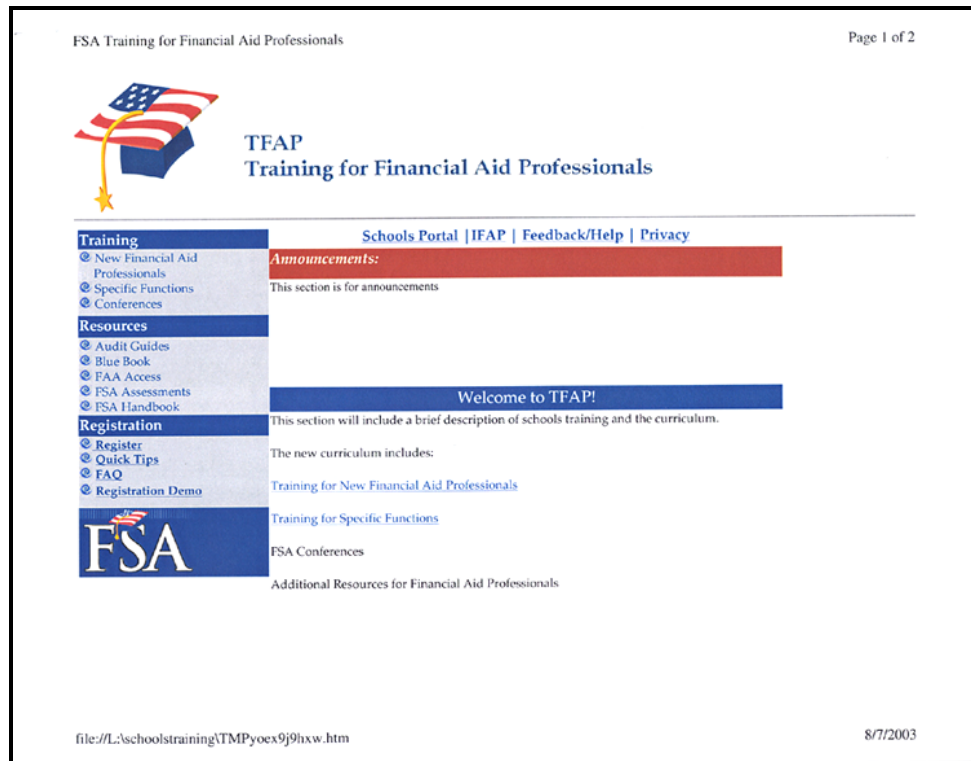
Electronic Vehicles:

Web Page

- The TFAP website will be the primary vehicle used in the deployment effort. The screenshot of the prototype below shows the overall layout of the website. The navigation bar will be on the left side of the screen, and will be updated by the team’s web specialist. The website will have a section for announcements, as well as contain a “welcome” message explaining information contained on the website.
- The blurb listed below introduces the curriculum to FAAs and will be used on the IFAP and TFAP websites.

FSA Provides New Training Resource for FAAs

Sneak a peak at the current and future training offerings, conferences and other resources for FAAs that have been consolidated on FSA’s new training website, www.?????????.gov. This centralized training resource will provide FAAs with easier access to professional development materials appropriate for their role and experience. In addition, this website includes descriptions of courses that are under development so FAAs can plan ahead for upcoming training.



- The TFAP web page on the FSA Internet site houses the curriculum listing and descriptions of the courses and materials, includes links to register for the courses, as well as links to the IFAP page and the Schools Portal.
- The web page provides a consistent message about the curriculum and it is a paperless deployment vehicle that is easily accessible via the web. Usage of the page can be measured by tracking the number of hits to the web page. Maintenance is lower than for a paper-based product, since updates will be made to the web, and will not require printing and redistribution of information.
- Links to the paper-based poster/flyer will be included on the web page so that financial aid professionals who desire to do so, can print posters and distribute them.
- Requirements discussed for the website included that the site must be easy to update, communicates key messages, contains links from IFAP and School's Portal, and meets deployment objectives.
- *Advantages:*
 - Paperless
 - Self-service
 - Consistent Message
 - Low Cost
- *Disadvantages:*
 - Technology may not be preferred by segment of audience
 - “Junk” mail may be ignored or deleted
 - Requires assistance from other FSA staff to develop/distribute.

Electronic Announcements

- Additional electronic deployment vehicles will include using email announcements to individual email accounts and listservs to push this information to financial aid professionals. Advantages of all electronic announcements are that they are paperless and provide a consistent message. Drawbacks include that usage of each vehicle varies by region, and that messages can easily be ignored or deleted.
- *Email Announcements:* Email to individual email accounts would be highly effective vehicle, but drawbacks include the lack of a comprehensive distribution list for all financial aid professionals.
- *Listservs:* Listservs are highly effective in some regions, but usage varies by region. They are low cost and paperless.
- Listed below is content that will be included in all electronic announcements to FAAs:

TO: ALL Financial Aid Administrators

FROM: Federal Student Aid

SUBJECT: New Training Website

FSA is pleased to announce a new website featuring all training, conference information and resources available to FAAs. This centralized training site features “one stop shopping” access to existing and upcoming courses and conferences, recommended training for new FAAs, and resources such as the Blue Book and the Audit Guide.

Visit the new website today at www.?????????.gov to and take advantage of FSA's training and development resources!

- *Advantages:*
 - Paperless
 - Consistent Messages
 - Low Cost
- *Disadvantages:*
 - Technology may not be preferred by segment of audience
 - “Junk” mail may be ignored or deleted
 - Requires assistance from other FSA staff to develop/distribute
 - Incomplete distribution lists

Other Electronic Vehicles Considered

- Initially, it was discussed that the website would include the Individual Curriculum Wizard, a tool that would allow financial aid professionals to tailor a personalized curriculum by answering a few simple questions. This tool is useful when there is a large volume of courses to choose from; however, since the volume of courses is small, the team decided that the usefulness of the Individual Curriculum Wizard was low relative to the effort to implement this tool.
- The project team discussed using regional FSA websites to deploy the curriculum, but decided against this since not all regions have websites, and the usage of existing websites is low.
- In addition, the web banner on the IFAP page was considered, but is no longer in use.
- Emailing soft copies of the poster/flyer to financial aid professionals to print, post and distribute was another option that was considered, but eliminated due to the effort required by the financial aid professionals. Instead, a soft copy will be posted on the web page for those financial aid professionals who want one.
- P-Messages are sent to school's mailboxes and can be easily ignored. Since the team will use email and listservs to reach FAAs electronically, the use of P-Messages was redundant.

Paper-based Vehicles:

Since FSA strives to operate as a “paperless” organization, the use of paper-based vehicles is limited.

Poster/Flyer

- A poster/flyer announcing the curriculum and providing the web link will be printed and posted in FSA training offices. A final version of the poster is being developed, but the first draft is included below for reference.



- **Advantages:**
 - Consistent Message
 - Can be posted
- **Disadvantages:**
 - Paper-based
 - May be ignored

Other Paper-Based Vehicles Considered

- Due to cost, business card-sized wallet cards (which would have included the web address for the FSA Course Curriculum) will not be used.
- Due to cost, post-it notes with the web address will not be distributed at NASFAA and EAC conferences.
- A written letter will not be sent to the schools since it does not directly reach our target audience.
- A pamphlet with information about the website will not be used since it would be more costly to produce and not as effective as a poster/flyer.

Face-to-Face:

Oral announcements during conferences and training events will be made to create awareness of the availability of the curriculum. Paper-based products like poster/flyers, wallet cards and post-it notes will primarily be distributed during live events.

Conferences

- Announcements by a senior member of FSA will be made at NASFAA conferences. An announcement will be made at the EAC conference this fall to announce the availability of the curriculum. Posters will be distributed at the EAC.
- Advantages:
 - Consistent Message
- Disadvantages:
 - Only reaches those who attend conference

Training

- A brief announcement will be made during all training events to further publicize the availability of the curriculum. The poster/flyer will be used as a slide included in all training presentations.
- Advantages:
 - Highly effective message
 - Captive audience
- Disadvantages:
 - Reaches only those who attend
 - Messages may vary based on presenter

Talking Points

- FSA now provides a new centralized training resource for FAAs
 - This website contains the latest information on current and future training opportunities, conferences and other resources, such as the Blue Book and Audit Guide
- This website is for ALL FAAs
 - This includes all financial aid personnel responsible for counseling students, processing financial aid data, financial aid auditing and accounting, and supporting financial aid systems
 - If you perform the following functions, this resource may be of use to you:
 - FAAs
 - Business Officers
 - Auditors
 - Accounting Personnel
 - System Technicians
- This website was created in response to feedback received from FAAs about training.
 - FAAs wanted to know about upcoming training in advance
 - FAAs wanted to know what training is appropriate based on their role in the financial aid process
- Provide Weblink: www.????????.gov

2.4 Key Success Factors

It is important that clearly defined success factors are identified for each vehicle used to publicize the new curriculum. The team discussed a variety of methods including discrete measurement tools and formal and informal feedback mechanisms. Success factors include, but are not limited to the following:

- *Number of hits to TFAP website*
- *Attendance*
- *Web link for comments on course offerings*
- *Feedback via the annual needs assessment.*

2.5 Timing/Resources

The project team discussed the cost and people involved in using all of the deployment vehicles outlined in this document. In addition, the team discussed timing of the development of these vehicles.

- An electronic vehicle such as development of a web page involves support from other FSA staff members since the project team does not include individuals with web development skills. This is not be a cost to the team’s budget, but involves a cost to the organization. Once developed, the maintenance costs for the web page are minimal, and unlike paper-based products, updates will not require printing of materials and re-distribution.
- Electronic vehicles such as emails, and listserves require content development by the project team, but distribution requires involvement of other FSA staff.
- Paper-based vehicles involve minimal development time and expenses, but the associated production costs could potentially be high.
- Face-to-face vehicles, such as announcements at conferences and training sessions, involve minimal development cost and resources. Content to be presented by speakers includes previously developed materials such as the poster/flyer, and announcements will be brief.

3 Next Steps

The team has refined the deployment approach, and reviewed the required resources, development time, approvals and production costs for each vehicle. The finalized recommendations now need to be implemented.

Specific next steps will include:

- Deployment of the TFAP Website
 - The team web specialist will update the TFAP website prototype and provide a version for the team’s final review and input.
 - The team will determine how much maintenance the TFAP website will require, and will assign responsibility to a team member.
- Marketing of the new TFAP Website through email and listserv announcements
 - The team will finalize draft content for both sets of announcements and disseminate messages.
- Distribution of the TFAP Poster
 - The team graphic designer will update the TFAP poster and provide a version for the team’s final review and input.
 - The team will distribute the poster to appropriate target audiences.
- Delivery of verbal announcements at conferences and training events
 - Finalize talking points for conferences and training.
 - Develop announcement materials (i.e., talking points and slides).
 - Determine speakers/presenters.
 - Finalize logistics for presenting at EACs.